



CERTIFICATE OF COMPLETION

CFP

THIS CERTIFIES THAT

ATTENDED THE FOLLOWING CONTINUING EDUCATION SESSION:

Course Title: Effective Charitable Financial Planning:
Financial Strategies, Client Psychology, & National Trends

Course Date: September 4, 2024

Location: Westin Galleria Dallas

Time: 8:00 – 10:30 AM

Format: Live Seminar

Instructor: Russell N. James, J.D., Ph.D., CFP®

This course has been approved for:

General Credit: 2.0

Program ID: 328724

Megan Hyman
DJCF & SWCF
President & CEO

